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Social Security Administration Digital Library
Ektron CMS Functional Specification

Version 4

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I. EXECUTIVE SUMMARY

INTRODUCTION

This Detailed Specifications Document (the “Specifications”) provides a clear, formal statement of the scope mutually outlined in the functional requirements gathering session(s) by Social Security Administration (“SSA”) and Fig Leaf Software, Inc. (“Fig Leaf”). It also may include suggested specifications required to execute the implementation identified herein.

The Specifications shall serve as the formal guiding reference for the development and theming cycles. In determining whether any Deliverables satisfy any service agreement incorporating this document by reference, if SSA desires any modifications to a function or feature reflected herein – whether before or after initial delivery from Fig Leaf – or seeks the addition of any function or feature not described herein, SSA agrees that an appropriate change order or modification must be executed by both parties before Fig Leaf undertakes such effort. In such case, SSA also acknowledges that an amendment to this document, or the drafting of additional documentation, may be required before work is commenced on any such effort.

This document, along with the previous 2 documents delivered by Fig Leaf (SSA Digital Library Design Specifications and SSA Digital Library Custom (Non-Ektron) Admin Tool Wireframes) defined the scope of the project and how the site should look and function. There are numerous references in this document to the previous documents. The information in this document supersedes the information in the previous documents in certain areas (noted within this document).

Lead Stakeholders

NAME	ROLE	ORGANIZATION
Christa Adle	Web Site Owner	Social Security Administration
Robert Segal	Manager, Requirements Gathering	Fig Leaf Software
Reginald Cooper	Project Manager	Fig Leaf Software

Change Log

DATE	AUTHORS	COMMENTS
1/5/15	Fig Leaf Software	First Draft
1/15/15	Fig Leaf Software	Version 3
2/9/15	Fig Leaf Software	Version 4

1.1 Background Information

SSA and Fig Leaf have entered into an agreement to redesign its Digital Library web site – to improve its navigation, search, and overall effectiveness.

1.2 Purpose

The purpose of this document is to fully describe the functional requirements of the new website (the “Site”), and to illustrate how those requirements will be satisfied in the website. The Site will serve as a centralized content management system as well as a portal to other SSA resources and data. The Site will be developed using Ektron, a content management system software package running on the Microsoft .Net platform.

In illustrating how the requirements will be satisfied, this document may describe a series of customizations to Ektron. Some out-of-the-box Ektron functionality may be mentioned, but this document is not intended as a reference for full exploration of such standard features.

1.3 Intended Audiences

This document is intended to guide implementation of the approved design. Its primary audiences, therefore, are SSA’s Project Manager and redesign committee, and Fig Leaf’s Web Programmer, Software Tester, Information Architect and Project Manager.

1.4 Assumptions and Constraints

This document is intended to capture all the functionality requirements and recommended customization that will be included in the initial site development. Design content produced by Fig Leaf, such as wireframes or comps, may not be the final graphical representation of the described components. Such included examples are intended only to support concepts, and do not serve as official representations of any Deliverable, unless expressly stipulated otherwise.

1.5 System Design

The system to be developed by Fig Leaf will consist of 3 interfaces. Additionally, Google Analytics will be used to track clicks on the site so it is mentioned below for completeness. The Ektron and Custom admin interfaces will require users to be maintained for each. SSA employees accessing the Ektron and Custom admin interfaces will be automatically logged in if their PIN is associated with an existing user in each respective interface. Each interface described below including a short description of functionality and access restrictions:

INTERFACE NAME	DESCRIPTION
Digital Library Web Site (DL)	This is the interface will be available to all SSA employees. The content on this site will be managed through the Ektron and Custom Admin interfaces described below. Wireframe diagrams have been prepared for this interface and will be referenced in this document where needed. This site will be best viewed using Internet Explorer 8 and higher on Windows 7.
Ektron Admin (Ektron)	This interface will be available to Ektron Administrators. Ektron Administrators will be set up with the Ektron Admin Interface. From this interface, users can administer Ektron and the DL Site, create site content, and maintain Ektron Admin users. The latest version of Ektron (9.10) requires Internet Explorer 10.0 and higher for content editing.

Custom Admin	This interface will be available to Digital Library Administrators. Library resources will be maintained from within this interface and reports on the DL site usage will be available from within this interface. Wireframe diagrams have been prepared for this interface and will be referenced in this document where needed. This site will be best viewed using Internet Explorer 8 and higher on Windows 7.
Google Analytics (GA)	Code to track the clicks on the DL site using GA will be included in the site template(s). The standard GA web site (external to the SSA DL web sites) will be used to view reports regarding the DL site. Access to the GA interface will managed through GA and will not be customized as part of this project.

Table 1: Interfaces

1.6 Terminology

The following table lists terms that are used in this document and descriptions of each.

TERM	DESCRIPTION
Audience	Terms that can be used to categorize tools and other site content. Audience terms include Claims Representative, Medical Offices and Disability Examiners. Audience will be maintained as taxonomy in Ektron.
Content Author	Ektron user(s) who have page and content creation and editing privileges.
ContentDM	Search engine used to search SSA Reports.
Core Services	A group of 3 web services (EMailCore, IVFCore and OfficeLookupCore) that can be accessed from any of DL or Custom Admin Websites to authenticate or retrieve information regarding SSA employees
Custom Admin Website	The Custom Admin Website will be used to maintain information regarding resources and provide privileged users access to reports regarding SSA DL Website usage
Ektron Admin Website	The Ektron Admin Website (Ektron Website), is the standard Ektron Admin interface that can be used to manage the content in DL Website.
Form	Forms will be maintained from with the Ektron Admin Website. A form will consist of a set of fields and instructions on how to handle the information entered in the form upon submission. Forms can be added after the initial development if needed.
Google Analytics	The login(s) to Google Analytics will not be managed by the SSA DL, Ektron or Custom Admin websites. Google Analytics will be used to track clicks on the SSA DL website and generate reports regarding the site usage.
PIN	Unique identifier for each SSA employee accessing any of the 3 websites. The PIN will be accessible through the HTTP headers.
Resource	A resource is a source of information that can be searched through the SSA DL. Resources must be registered with the SSA DL to be listed, and with Summon to be searched. Resources will be maintained through the Custom Admin Website.

Research Guide	PDFs that can be uploaded to the site. Each research guide can be associated with 0, 1 or many subject areas.
Resource Type	Resource types include Database, Journal, Article, eBook and Other. The resource types will be maintained as taxonomy through the Ektron Admin Website. Each resource can be associated with a single Resource Type
SOLR	The search engine that will be used to crawl, index and search the SSA DL Website.
SSA DL Custom (non-Ektron) admin Tool Wireframes Version 1.2	SSA Digital Library Custom (non-Ektron) Admin Tool Wireframes (SSA DL Custom Admin). Wireframes from the SSA DL Custom Admin will be referenced from this document.
SSA DL Website	The SSA DL Website (DL Website) will be accessible by all SSA Employees
SSA DL Design Specifications Version 1.4	SSA Digital Library Design Specifications Document (SSA DL Design Spec). Wireframes from the SSA DL Design Spec will be referenced from this document.
Subject Area	Terms used to categorize resources (sample terms include business & economics, facilities management, information technology). Subject areas will be maintained as taxonomy in Ektron. Each Resource can be associated with 1 or more subject areas.
Summon	The search engine that will be used to search resources available to the SSA DL.
Taxonomy	A list of terms maintained in different branches from within Ektron that can be associated with content for purposes of categorization and organization.
Tool	Local or external web pages that contain information or interactive forms (such as the BMI or Fetal Alcohol Calculators).
Tool Type	Tools can be categorized by Audience (Claims Representative, Medical Office, Disability Examiner). Audience is a tool type when associated with a tool.

Table 2: Terminology

2. DEVELOPMENT

2.1 Ektron

The Ektron Content Management System software package comes with a variety of built in functions that can be customized as needed or used "out-of-the-box." Additional features are purposefully customizable in order to meet varying organizational needs and/or to integrate with external systems.

2.1.1 Roles

Three different roles will be established for editing and managing content within the SSA DL site. Management of user roles and permissions can be accomplished using the standard Ektron-provided tools. Fig Leaf will configure roles for the initial release, SSA will have the ability to changes roles and permissions as needed. Users will automatically be logged in to the Ektron Administrator if their PIN number is associated with an Ektron user. Each Ektron user will be associated with one or more of the following roles.

2.1.1.1 Contributor

One or more Ektron users can be designated with this role. Contributors will be allowed to edit content, and submit changes for approval. This role can be restricted to content within one or more sub-folders or pages of the site. Contributors can also be given the ability to create new pages within folders on the site, and to edit links and wording on navigation elements. Contributors can propose changes to content/new content, but are not able to approve these changes for publication to the site.

2.1.1.2 Approver

One or more Ektron users can be designated as Approvers. Approvers have control over one or more pages or folders within the site, and for pages under their control, Approvers can accept or reject changes to a page. Approvers can also edit content, if desired. They will be able to change and then approve their own changes. Multiple layers of approval can be configured within Ektron, but this functionality will not be set up for SSA at this time, based on the initial design discussion. SSA will be able make changes to the approval workflow as needed using built in Ektron functionality. Documentation for configuring the Ektron approval chain is available at this url: http://documentation.ektron.com/cms400/v8.70/Reference/Web/Folders/folders.htm.

2.1.1.3 Administrator

At least one user must be designated as an Administrator, and there can be multiple Administrators if desired. Administrators will have all of the abilities of the other two roles, and will additionally be able to set/change the roles and permissions of other users.

2.1.2 Content Workflow

A change to the content is defined as any of the following:

- Creation of a new page
- Editing of one or more elements on an existing page
- Editing of the text or navigation links in the basic site navigation

A user with the necessary permission to perform any of these changes can edit and then submit their change through the Ektron CMS. The change is then routed for review by Approvers.

Whenever a change is submitted, an email will be generated to content approvers. The change will be in a pending state until it is approved or rejected.

The following figure illustrates the content approval cycle:

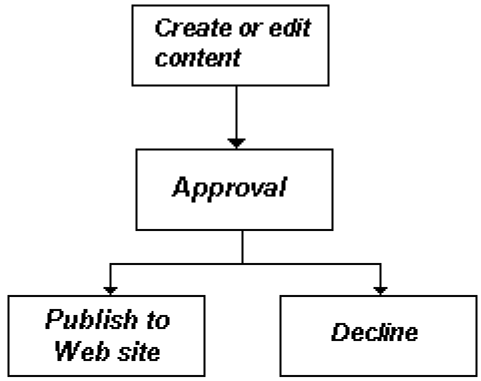


Figure 1: Ektron Workflow

If a page that was submitted for approval is declined, it will be removed from the approval chain and will need to be resubmitted. When a submission is declined, an email will be generated and sent to the user who made the approval request. Documentation for the Ektron Approval workflow is available from this url: http://documentation.ektron.com/cms400/v802/WebHelp/Managing%20Folders/Approvals/Approvals_intro.htm.

2.1.3 Content Creation and Editing

2.1.3.1 Standard Rich Text Editing Fields

Templates for the Home page and Secondary pages will contain content areas that can be edited. The editor is opened from the Edit button within Ektron, and resembles a standard word processing program, with rich-text editing features:

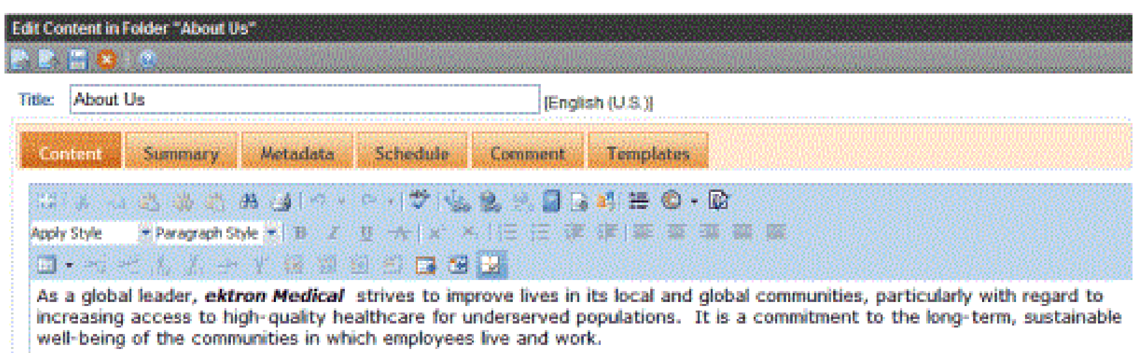


Figure 2: Ektron Text Editor

Formatting of text can be done through this interface. Users can also edit text fields using HTML, if desired. Images, tables, and hyperlinks can be inserted into any text field. Within the editor links can optionally be opened in a pop-up window if needed.

Some elements, such as fonts and colors, are controlled through the page template, and are not changeable by the content editor. This is necessary so that the site maintains a consistent look and feel.

2.1.3.2 Section 508 Compliance

All newly-created content will have the option to be checked for compliance with accessibility standards. If this option is checked, the content will be validated for compliance. A non-compliant page will not be submitted for approval, and message indicating non-compliance will be displayed to the person editing the content.

Alternative Text for any images added will be provided through the editor:

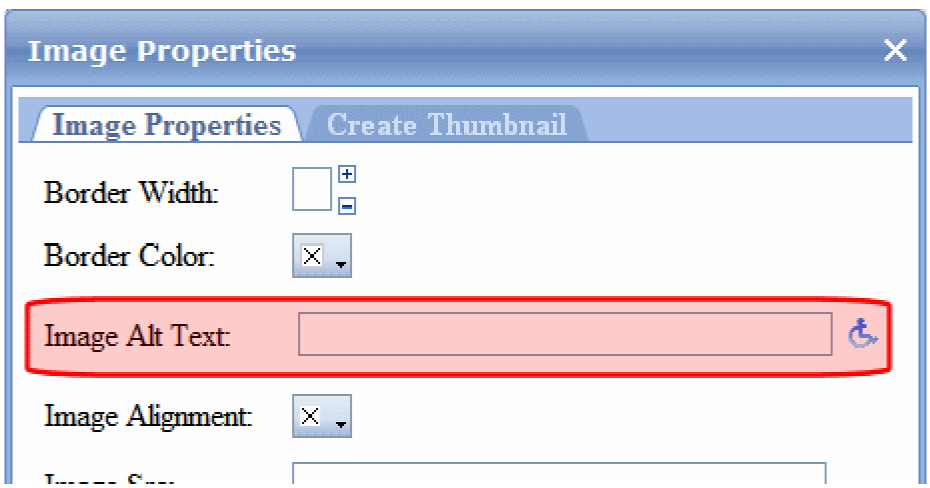


Figure 3: Image properties dialog, with alt text highlighted

The image alt text field can only either be made required for all users (contributors and approvers) or optional for all users. The alt image field will be made required for all users and it will be a training issue regarding how this field should be populated.

The table below lists dialog boxes in which accessibility information can be entered. This information can be entered at the time content is added. Fig Leaf recommends that this information be entered whenever possible.

Dialog	Field	How filled if no value exists

Image Properties	Image Alt Text:	Uses the image's title
Table Wizard - Cell Properties Tab	Abbreviation: Categories:	Not automatically filled when no value exists
Table Wizard - Accessibility Tab	Caption: Summary:	Not automatically filled when no value exists
Hyperlink Manager (Includes Quicklinks)	Tooltip:	Contents of Link Text field copied

Figure 4: Accessibility options and default content

2.2 SSA DL Site Content

2.2.1 Content Types

Smart Forms are used in Ektron to maintain and share structured information. During the discovery phase, a number of things were identified that should be implemented as Smart Forms.

A Smart Form can be defined by any number of fields. A "Smart Form content instance" is a specific copy of a Smart Form with assigned properties. A Smart Form is similar to a database, and a Smart Form Content instance is similar to a database record.

Once created, a Smart Form content instance can be displayed on multiple pages and in multiple layout formats. Different layout formats can be created as needed by using standard or custom widgets, or by using the Ektron API to write custom code. For example, news may be listed on the home page showing only a title, date, and the first line of text. When the user clicks on the news article, they are taken to a full screen display of all the news information. The news can be displayed in 2 formats on 2 different pages using 2 different views.

The following Smart Forms will be created to support the content needs of the new site. Field types are indicated for each field. Rich text fields will allow HTML formatting to be included using a WYSIWYG editor. Text fields have no field type listed. The rich text (WYSIWYG) editor can be configured to allow/disallow javascript code to be included in the rich text. Javascript will be disallowed by default.

All screens referenced in this section will be written as a number following the name of the screen. This number will refer the wireframe in the SSA DL Design Spec document.

2.2.1.1 Library News Smart Form

The 3 latest Library News content instances will be listed on the home page (3.1). Clicking on a specific Library News instance will display the News Article Page (18.1). Additionally, the Library News instances will be listed by the chosen year on the News Page (17.1).

2.2.1.1.1 Fields

(a) Headline (text)
(b) Date (date)
(c) Image (text)

(d) News Text	(text)
(e) Teaser	(text – 120 characters)
(f) Topic Taxonomy (multiple selections can be chosen)	(select list)

2.2.1.1.2 Display Formats

(a) News Detail (to display news on the Home Page (3.1) in the Resource Spotlight area). The teaser will be displayed (or if blank, the headline will be displayed)
(b) News Listing (to be used on Home Page (3.1) and News screens (17.1))
(c) News Article (to be used on the News Article Screen (18.1))
(d) Related Information (to be used to display news in Related Information box appearing in the right column on many screens (4.2.15))

2.2.1.2 <u>FAQs Smart Form</u>

2.2.1.2.1 Fields

(a) Question	(text)
(b) Answer	(text)
(c) FAQ Category Taxonomy	(text)
(d) Active Y/N	(Boolean)
(e) Sort Order	(integer)

2.2.1.2.2 Display Formats

(a) FAQ Screen (21.1) include hide and display functionality. Only active FAQs will appear on this screen. The FAQ Categories will be listed alphabetically with the individual FAQs listed in the order specified. If a particular FAQ Category has no associated active FAQs, it will not be displayed on this screen.

2.2.1.3 <u>Contact Forms</u>

The following contact forms will be maintained (including the fields for each) in Ektron (additional forms can be added later as needed). Once created, a form can be placed on pages as needed. The contents of each form submission will be stored in a database and will be accessible through the Cusom Admin Interface. Emails will be sent to a single or group email address notifying the recipients that a form has been submitted (the email address(es) can be different for each form type).

(a) Research Assistance Form
(b) Access to a Resource Form
(c) Password Assistance Form
(d) Request for an Article Form
(e) Suggesting a New Resource Form
(f) Training Request Form
(g) Reporting a Problem Form

2.2.1.4 <u>Staff Smart Form</u>

2.2.1.4.1 Fields

(a) Name	(text)
(b) Title	(text)
(c) Role	(text)
(d) Location	(selected from Location

	Taxonomy)
(e) Image	
(f) Active Y/N	(Boolean)

2.2.1.4.2 Display Formats

(a) Staff Listing Page (20.1)

2.2.1.5 Research Guide

2.2.1.5.1 Fields

(a) Title	(text)
(b) Research Guide Type	(selected from Research Guide Smart Form Instances)
(c) Description	(text)
(d) PDF URL	(text)
(e) Active Y/N	(Boolean)

2.2.1.5.2 Display Formats

(a) Research Guide listing (Wireframe 15.1). Research Guides will be listed, grouped by Research Guide Type. A particular research guide type section will not appear if there are no associated research guides. Only research guides marked as active will be displayed on this page.

2.2.1.5 Research Guide Types

2.2.1.5.1 Fields

(a) Name	(text)
(b) Description	(text)
(c) Active Y/N	(Boolean)

2.2.1.6.2 Display Formats

(a) Research Guide listing (Wireframe 15.1). Research Guides will be listed, grouped by Research Guide Type. A particular research guide type section will not appear if there are no associated research guides. Only research guides marked as active will be displayed on this page. Only Research Guide Types marked as active can be associated with Research Guides.

2.2.1.6 Training Workshop Smart Form

2.2.1.6.1 Fields

(a) Title	(text)
(b) Description	(text)
(c) Subject Area	(chosen from Subject Area Smart Form instances)
(d) Resource	(chosen from SSA DL Resource listing maintained in SSA DL Custom Admin Site)

(e) Start Date	(date)
(f) Start Time	(time)
(g) End Date	(date)
(h) End Time	(time)

2.2.1.6.2 Display Formats

(a) Training workshop listing (not included in wireframes)
(b) Training and workshop detail page (not included in wireframes)

2.2.1.7 <u>Video On Demand Smart Form</u>

2.2.1.7.1 Fields

(a) Name	(text)
(b) Description	(text)
(c) Date Added	(date)
(d) URL	(text)
(e) Active Y/N	(Boolean)

2.2.7.2 Display Formats

(a) Training and Workshops Page Video on Demand Training Listing. Video on Demand Smart Form instances chosen by the content author will be displayed in this list.
(b) Video on Demand Training Listing. All active Video on Demand Training Smart Form instances will be listed on this page in alphabetical order.

2.2.1.8 <u>Tools Smart Form</u>

<u>Tools can be internal or external websites that provide some kind of useful functionality for a specified audience.</u>

2.2.1.8.1 Fields

(a) Name	(text)
(b) Description	(text)
(c) URL	(text)
(d) Audience	(selected from audience taxonomy)
(e) Active Y/N	(Boolean)

2.2.8.2 Display Formats

(a) Claims Representative Tools (DL Wireframe 13.1). All external web links will open in a new window or tab.

2.2.1.9 <u>Subject Areas</u>

Subject areas will be used to categorize resources. Subject areas can be added by privileged content authors as needed. Subject areas included in the initial development will include Business & Economics, Facilities Management, Information Technology, Law & Government, Medical, News Sources, Occupations, Reference (Quick Info), and SSA Resources.

2.2.1.8.1 Fields

(a)	Name	(text)
(b)	Short Description	(text)
(c)	Full Description	
(d)	Active Y/N	(boolean)

2.2.8.2 Display Formats

(a) All Subject Areas page (5.1). Subject Areas will be listed in alphabetical order. Only active Subject areas will be displayed. The Subject Area Name and short descriptions will be displayed on this page.
(b) Single Subject Area Page (6.1). Subject area and short description will be displayed by default when this page loads. Clicking the Show More > link will display the Full Description.

2.2.1.10 <u>E-Pass Request Form</u>

Similar to contact forms, the E-Pass request form will be maintained in Ektron and form submissions will be saved and can be reviewed and updated using the tools in the Custom Admin web site (as described below in Section 2.6.1).

2.3 SSA DL Site Organization

2.3.1 Taxonomy

The Ektron taxonomy is used primarily to connect related pages. A taxonomy term (or terms) can be assigned to a page or Smart Form instance upon creation and edited at any time. Attaching a taxonomy term or terms to a page or Smart Form instance can be made optional or mandatory. We suggest making taxonomy term assignments optional (there will be specific pieces of content where taxonomy terms are appropriate and where they are not). Taxonomy terms in each branch will appear alphabetically when listed within the site and the Ektron admin interface (regardless of the order in which they were entered).

BRANCH NAME	SAMPLE TERMS AND USAGE
Audiences	***Sample Terms:*** Claims Representative, Disability Examiner, Medical Offices (list from Wireframe 13.1) ***Usage:*** These terms will be used to identify which tool(s) are displayed on each of the tools pages (Wireframe 13.1), One or more audiences can be associated with a tool. These tools will be used to populate the "Tools For" menu choices in the main navigation.
FAQ Categories	***Sample Terms:*** Resource Access, Technical Support, Research Issues and others (from wireframe 21.1) ***Usage:*** These terms will be used to categorize FAQs (Wireframe 21.1).
Locations	***Sample Terms:*** 1346 Annex, 1359 Annex (list from Wireframe 20.1) ***Usage:*** These terms will be used to identify the location of a particular staff member (used in Wireframe 20.1)
Procurement Method	***Sample Terms:*** Micropurchase, OAG, Fedlink, Fedline Direct Express, Other ***Usage:*** A procurement method can be associated with resource contracts (1 per resource contract)
Network	***Sample Terms:*** Citrix, Internet, Intranet, File ***Usage:*** Resources can be associated with a Network (SSA DL Custom Admin Wireframe 33.1)
Resource Access Type	***Sample Terms:*** Public, Self-Registered, Shared Login, e-Password ***Usage:*** Used to indicate how a particular resource can be accessed
Resource Type	***Sample Terms:*** Database, Journal, Article, eBook, Other ***Usage:*** Used to indicate type of resource

Table 3: Taxonomy Branches

2.3.2 Templates

Content authors will be able to choose a template to show Related Information, Top FAQs, and/or Need Help in the right column of a page. If displayed on a page the Top FAQs area will allow the author to select from a list of the FAQ elements. Page author will also be able to choose whether to populate the Related Information box manually or automatically. If populate manually is chosen, the author will be able to select from a list of the News articles to choose which to display. If populate automatically is chosen, the Related Information box will be populated with the latest News articles that match the topic taxonomy of the article being viewed.

2.3.3 Image Management

Images can be uploaded to the Ektron Library and can be used in multiple places on the site. When a content contributor wishes to place an image on a page they must search the library.

2.3.4 Custom Scripts

Custom scripts will be written to integrate the site with external information sources. The scripts required for your site include the following (additional scripts may need to be created during development):

SCRIPT NAME	DESCRIPTION
contentdm_search.aspx	Display ContentDM search box on SSA Reports Archive Page
contentdm_advanced_search.aspx	Displays ContentDM advanced search form on page linked to from SSA Reports Archive Page
summon_search_home.aspx	Display Summon search box on home page
summon_search_secondary.aspx	Display Summon search box on secondary pages
user_login.aspx	Query Core Services when user first enters site to determine status of user (basic or administrator)
password_request_form.aspx	Display form to users requesting password. Used in wireframes 12.1 and 15.1. The script will accept url parameter indicating if this is a new password request or a password reset request. A url parameter could also be passed to this page that would limit the resources (databases) listed by Resource Type (described in Taxonomy section). This script will display the appropriate fields based on where the "on behalf of" check box is checked. This script will also handle the form submission as described in the forms section of this document. Additionally, this script will query Core Services to validate the identity of the person on whose behalf the form is being submitted.
epass_admin.aspx	This script will display the contents of the E-Passwords data repository (resource name, user, password, date password requested, date password granted). From the screen displaying this, administrator users will be able to send a user appearing in the list a password for the resource requested, remove a password granted to a user, change a password (or other information), and/or add a new password for a user,

Table 4: Custom Scripts

2.3.5 Click Tracking

All pages clicks will be captured and sent to Google Analytics (GA) for the purpose of populating GA reports. Limitations of GA include:

1. Data regarding clicks will not be retained for more than 2 years.
2. Data passed to GA for each click cannot include personal information. PIN numbers will be associated with each click without any additional information.
3. Without exporting data from GA, click data cannot be correlated with other data captured by the system (including resources usage by office location and other parameters).

To get around the limitations of GA specific information will be captured (for reporting purposes) regarding site usage.

Information will also be collected stored within the SSA DL Site regarding the users of when they click on a link. Specific information from Core Services will be stored along with the user's PIN. To increase system performance, Core Services will not be called for every click, but only if 30 minutes have passed since the last time a call to Core Services was initiated. Core Services will be called when the user first enters the site and the returned information will be stored for the user. This information will be updated only after subsequent calls to Core Services have been made. The number of minutes between Core Service calls will initially be set to 30 minutes, but can be updated through System Settings as needed. If Core Services is not available at the time it is queried, placeholders will be stored within the click information and Core Services will be queried the next time a user clicks a link (regardless of how many minutes have passed since their last click).

2.3.6 File Uploads

PDF and other files that are uploaded using the Custom Admin website will stored in separate directories to organize the files. Additionally, files may be renamed to more easily associate them with the resource of other piece of information to which they are related.

FILE PURPOSE	FILE TYPE	DIRECTORY LOCATION
E-Pass Add (10.1)	Any	/files/epassadd/
E-Pass Approved (19.1)	Any	/files/epassapproved/
E-Pass Decline – Message (16.1)	Any	/files/epassdeclined/
E-Pass New (13.1)	Any	/files/epassadd/
Help Request – Closed (27.1)	Any	/files/helpclosed/
Help Request – Opened (24.1)	Any	/files/helpopened/
Reporting a Problem Form (SSA DL 26.7.1 and 26.7.2)	JPG, GIF, PNG	/files/problems/
Resource Contract (33.1)	PDF	/files/resources/contracts/
Resource Associated File (33.1)	PDF, Excel, Word, PowerPoint, Text, Video, or Other	/files/resources/supporting/
Resource File Source (33.3.1)	Any	/files/resources/

Table 5: FIle Upload Management

2.4 SSA DL Site Pages

2.4.1 Common Elements

Every site page will display the header (28.1) which consists of the Header Menu and SSA DL Logo (which will be hardcoded into the page templates), and the Main Navigation (which will be maintained in Ektron).

2.4.2 Interior Pages

Every page on the SSA DL Website, besides the home page, is considered an interior page. Interior Pages can be created as needed by authorized content authors. There will be 3 types of interior pages:

(a) Pages that get created once

These pages will be created as part of the site development including the Search Results Page (4.1), the FAQ Page (21.1), the Databases A-Z Page (9.1) and others.

(b) Pages that get automatically created

These pages will be created and populated automatically at run time based on information entered in the Custom Admin website, information returned from search engines (Summon, SOLR, ContentDM) or other sources. The Dynamic DB Record (24.1) is an example of this type of page. The base pages will be created as part of the initial development. Some of these pages may contain a right column (described in Section C below). The Page Listing section below will indicate which pages are eligible to have right columns and how the right column could be populated).

(c) Pages that get created based on templates

These pages can be created as additional instances of a particular type of page (including Library News Pages which are based on the News Article layout (18.1)), or just the general 2 column layout. Information on these pages will be maintained by content authors.

These pages will allow the content author to toggle the display of the right column, and indicate its contents for a particular page. The order in which the contents will be displayed can be specified. If no contents are chosen, the Right Column will not be displayed (even if it was specified to be displayed). Right column contents could include any or all of the following:

RIGHT COLUMN CONTENT ITEM	DESCRIPTION
Need Help?	Displays a message that is maintained with Ektron. The Need Help message will be the same on all pages that display it.
Text Box	Open text block where a page's content author can enter any information.
Related Information	Open text block where a content author can choose to link to any number of other pages. Clicking on any of the links will display that page.
Top FAQs	A predefined list of FAQs that will be maintained in Ektron. The same predefined list will display on any page that shows the Top FAQs section. Clicking on an individual FAQ will display the FAQ page (21.1) with the chosen FAQ expanded.
Related FAQs	An area where a content author can choose specific FAQs to be displayed on a page. Clicking on an individual FAQ will display the FAQ page (21.1) with the chosen FAQ expanded.

Table 6: Right Column Content Choices

2.4.3 Page Listing

The following table lists each of the interior pages described in the SSA DL Design Spec along with notes regarding special features of the page and its source of content. Additionally, it is noted whether each page will be dynamically populated at run time (Type 2), or as part of the initial development (Type 1). The right column will always be eligible to display on Type 1 pages.

Unless otherwise mentioned in the notes column below, page content and features will be editable through code. Unless otherwise mentioned, rows indicated as Type 2 pages will not be eligible to display the right column (as described above as an option for interior pages).

PAGE NAME (FROM SSA DL DESIGN SPEC)	PAGE TYPE	NOTES
3. Home	Type 1	Links in the Services & Tools, Research and Need Help? sections will be maintained using Ektron tools. The news article to display in the Resource Spotlight area can be chosen as a property of the page. The teaser for that news article will be displayed (if teaser is left empty, the headline will be displayed) and will be linked to the news article page for that news article.
4. Site Search Results	Type 2	Results of searches run from the header search box with "This Site" selected.
5. All Subject Areas	Type 2	List of the subject areas (from Ektron Subject Area Smart Form Instances)
6. Medical / Single Subject Area	Type 2	Example of a page linked to from the All Subject Areas page (5.1). All active resources associated with the Subject Area selected will be displayed in alphabetical order. The list can be filtered by a selection for the Resource Type drop down list.
7. Search Results by Type	Type 2	This page will display the results of a search. If the search is initiated from the page header search box (located on all pages), the user can choose to search against the Library Resources (in which case the information returned from Summon will be displayed), or SSA Reports (in which case the information returned from ContentDM will be displayed). If a search is initiated from the center section of the home page, the results from searches against all 3 sources (site index, Summon and ContentDM) will be displayed.
8. Search Results as List	Type 2	Same content as displayed on the Search Results by Type screen but in a different format.
9. Databases A-Z	Type 2	Displays a list of active resources maintained in the SSA DL Custom Admin that have "database" chosen as their Resource Type. Results will be grouped by letter.
10. SSA Reports Archive	Type 2	Displays results returned from ContentDM for SSA reports. Also accessible directly from the Resources choice in the main navigation (in which case the latest 10 reports will be displayed). The right column can be displayed on this page. The About SSA Digital Reports section will be created using the Text Box section option). The right column will be eligible to be displayed on this page (and its contents specified as described above in Section 2.4.2 Interior Pages).
11. SSA Reports - Adv. Search	Type 1	The search criteria entered on this page will be used to create a query to submit to

		ContentDM. The search results will be displayed on the same Search Results by Type and Search Results as List described above.
12. My Resources	Type 2	SSA DL pages or resources that have been marked as a Favorite by the user viewing the screen. Note that resources marked as “favorite” from within Summon screens will not be listed on this screen. The right column will be eligible to be displayed on this page (and its contents specified as described above in Section 2.4.2 Interior Pages).
13. Claims Representatives Tools	Type 2	The audiences identified in the Audience Taxonomy in Ektron will be used to populate the “Tools For” choices in the main navigation. The right column will be eligible to be displayed on this page (and its contents specified as described above in Section 2.4.2 Interior Pages).
14. Request Access	Type 1	Every form created for the site and maintained in Ektron will be displayed using this layout. Each page will have an introductory paragraphed displayed. On the request access form the database select list will be populated with an alphabetic list of active resources that have “database” chosen as the Resource Type.
15. Research Guides	Type 2	The Research Guides Types and their descriptions will be displayed in alphabetical order with the respective associated research guides listed under each type in alphabetical order. The right column will be eligible to be displayed on this page (and its contents specified as described above in Section 2.4.2 Interior Pages).
16. Training & Workshops	Type 1	This page will contain a text block (editable by privileged content authors) followed by the Training Request form (which can be maintained in Ektron). The Videos on Demand Training in the right column will be implemented using the text box option for the right column contents.
17. News	Type 2	The news page will be populated with Library New Smart Form Instances. The page will list this year’s articles in reverse chronological order unless another year is chosen. The news article to display in the Resource Spotlight area can be chosen as a property of the page. The teaser for that news article will be displayed (if teaser is left empty, the headline will be displayed) and will be linked to the news article page for that news article.
18. News Article	Type 2	The full article will be displayed on this page (including image, date and text). The right column will be eligible to be displayed on this page (and its contents specified as described above in Section 2.4.2 Interior Pages). This page can be link to from search results, the News Page, the Resource Spotlight areas, Related Information or anywhere else in SSA DL site.

		The right column will be eligible to be displayed on this page (and its contents specified as described above in Section 2.4.2 Interior Pages).
19. About SSA Digital Library	Type 1	The About SSA Digital Library page will be created as part of the initial development.
20. Staff	Type 2	The introductory paragraph can be edited by content authors, the Library Staff table will be populated automatically by active staff entered in the Staff Smart Form. The right column will be eligible to be displayed on this page (and its contents specified as described above in Section 2.4.2 Interior Pages).
21. FAQ	Type 2	The FAQ Smart Form instances will be listed grouped by FAQ category. The categories and FAQ under each will be displayed in alphabetical order. Only FAQ categories with associated FAQs will be displayed. The right column will be eligible to be displayed on this page (and its contents specified as described above in Section 2.4.2 Interior Pages).
22. Contact	Type 1	This page provides a way to get to all of the site forms. Each form will be placed on a separate page and can be accessed directly, or they can be accessed from this page.
23. Confirmation	Type 1	Notice to be displayed following each form submission.
24. Dynamic DB Record	Type 2	This page will be displayed when a user clicks on a database from the Databases A-Z page or from the Search Results page. The Name and description of the database will be displayed as well as links to access or request access to the database (depending on the Resource Type and access status of the user). The Related Information on the right side of the screen will automatically list the subject areas to which the database is associated with links to each Subject Area Page.
25. Journals A-Z	Type 2	This page will be populated with the list of Journals returned from Summon.

Table 7: SSA DL Page Listing

2.4.3.1 Site Wide Notifications

If a Site Wide Notification message has been turned on (using the System Settings screen described in section 2.6.5 below) it will display at the top of every screen in the SSA DL Site until dismissed by the user. The date and time of the dismissal will be recorded and the Site Wide Notification message will not be displayed for that user until a new Site Wide Notification message is added and turned on. The following 2 partial screens (home page and interior page) illustrate how the message will be displayed.

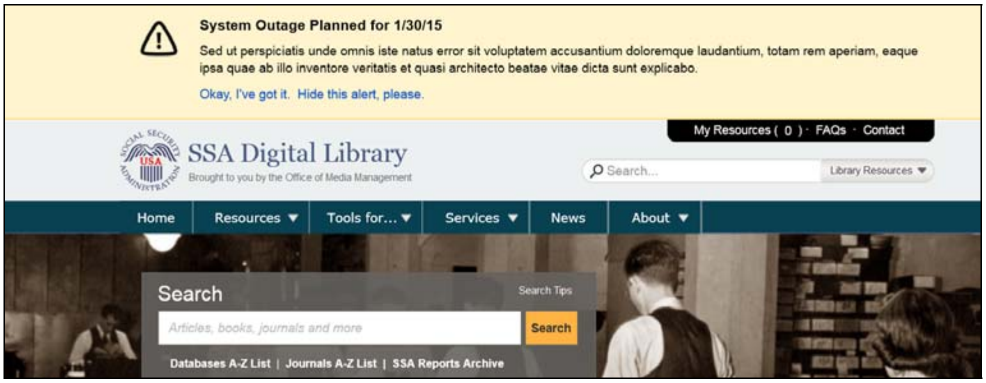


Figure 5: Home Page with Site Wide Notification

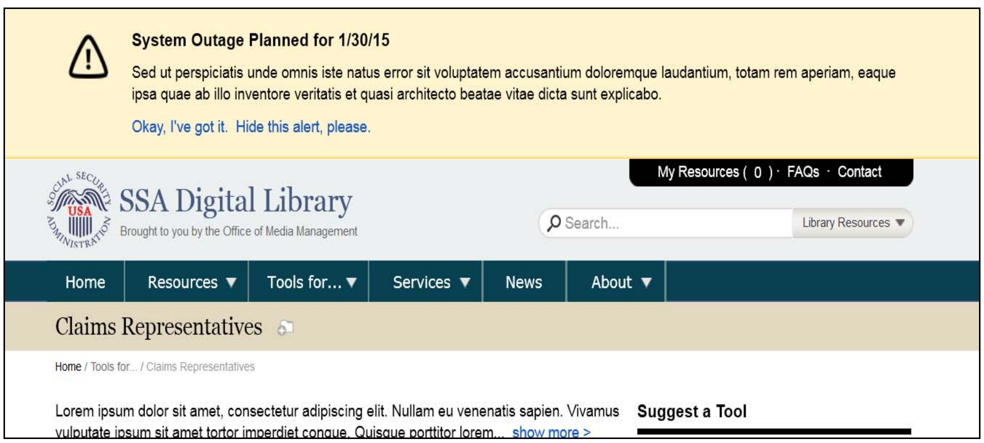


Figure 6: Interior Page with Site Wide Notification

2.4.3.2 Site Maintenance Schedule

The Site Maintenance Schedule will also be maintained using the System Settings screen described in section 2.6.5 below. If a user tries to access the site during one of the times the site is down for maintenance the Site Maintenance message will be displayed in the middle of the screen (as illustrated in the image below). When the site is down the Custom Admin users will be able to access the site without seeing this message.

Figure 7: Site Maintenance Message

2.4.4 My Resources

The “Add to My Resources/Favorites” will appear throughout the site next to links for tools and other resources. When clicked, the information will be passed to the server. The My Resources count (in the top right corner of the screen) will be incremented accordingly. The screen will not need to be reloaded during this process. When a user clicks the My Resources link they will be redirected to another page listing their resources. From the My Resources screen a user will also be able to remove resources from their My Resources list. Every user’s My Resources list will be maintained in a custom built database (described in Appendix D below).

2.5 Third Party Integration

2.5.1 Single Sign On (SSO)

Users will be authorized to access the DL, Ektron Admin and Custom Admin websites based on their PIN numbers. Core Services will be used to retrieve user information based on the PIN. This information will be used to track system usage and to provide additional information for form submission. Additionally, when forms are submitted on behalf of others, the Core Services will be used to validate user information.

There are 3 web services associated with Core Services (EmailCore, IVFCore and OfficeLookup core. Appendix A lists sample Core Service calls and the information received (XML) from each.

2.5.2 ContentDM Integration

The Search form on Wireframes 10.1 and 11.1 will be used to search against the ContentDM SSA Digital Reports Archive. The term(s) entered will be used to construct a url to be submitted to ContentDM. The XML returned by ContentDM will be used to present the search results shown on Wireframe 10.1.

The Advanced Search link on Wireframe 10.1 will display the ContentDM advanced search form. Once submitted, the entries on the form will be used to generate a search request to be sent to ContentDM with the results of the search displayed on Wireframe 10.1. See Appendix B for ContentDM information.

2.5.3 Summon Integration

Summon will be used to search all SSA DL Resources. Summon will be administered external to the site. The site will use the Summon API to submit search results and display the search results. See Appendix C for Summon information.

2.6 Custom Admin

The Custom Admin Website will only be available to administrator users. The following features will be available from within this site:

1. Form Submissions

   Form information that is submitted from the various forms can be viewed and updated from this site.

2. Reports

   System usage reports can be defined and run from this site.

3. Resources

   The resources and associated information can be maintained from this site.

4. Users

   The users who can access this site and their level of access can be maintained from this site.

5. System Settings

   Additional settings needed to support this site and the SSA DL site including auto replies to form submissions can be maintained from this site.

A number of database tables will need to be created to support the SSA DL Custom Admin and site usage reports. These tables and preliminary designs for each are listed in Appendix D below.

2.6.1 Form Submissions

The forms that will be made available to DL site users are mentioned in Section 2.2.1.3 above. Information submitted from each of these forms will be stored and can be viewed and updated by Custom Admin users. Changes to information captured by these forms, internal comments and the status of the requests made in each form will also be tracked.

The E-Pass request form submissions will be handled differently from the other forms because of the human interaction needed to review and act upon the form submissions. Resource access requests coming from the DL web site can result in the request being granted, declined, or under review until a final decision is made. If granted, the Approved – Message / e-Password (19.1) page will be displayed.

Additionally, admin users can submit the form on the New e-Password Request (12.1) page to initiate the process of a user request access to a resource. If the Approve button is clicked on this page, the Approved – Message / e-Password (19.1) page will be displayed.

2.6.2 Reports

The Custom Admin site will include report management tools. There will 3 kinds of reports supported:

2.6.2.1 Real Time Reports

These reports formats and the type of data which they contain are hard coded. These reports contain real time information as of when they are run, they can be run real time by visiting their pages in the Custom Admin site. They can also be scheduled to run and be emailed to particular recipients at any time.

Real Time Reports include the following:

- Unique Visitors and Total Hits (37.1)
- Clicks Per Resource
- Total Help Requests (44.1)

2.6.2.2 Predefined Reports

These reports formats and the type of data which they contain are hard coded.

Predefined Reports include the following:

- Contract Information (43.1)
- Ad Hoc Help Reports (45.1)
- Ad Hoc Resource Reports (40.1)

2.6.2.3 Custom Reports

The filter criteria used to define the information contained in a report and the fields to be displayed in the report can be defined using the Create A Report functionality. Reports created using the Create A Report feature can be saved and run again when needed.

Each time a Predefined or Custom report is run the time that it is run and the criteria used to create the report will be saved. All the reports that have been run can be viewed, updated and run again from the Report Archives Page (42.1).

2.6.3 Resources

Forms will be included as per the SSL DL Custom Admin document to add and maintain resources to be displayed in the DL web site. Adding resources to Summon for inclusion in the resource searches will be done external to the site.

2.6.4 Custom Admin Users

Users with privileges to use features included in the Custom Admin web site will be classified as either Admin or Super Admin users. The following features will only be maintainable by Super Admin users:

- View and maintain system settings (SSA DL Custom Admin Wireframe 50.1)

- Edit user access levels (Admin or Super Admin)
- Super Admin users will have the choice to group the report by PIN (this option will not appear in the “By” drop down list for regular admin users).
- On the Ad Hoc Resource Reports page super admin users will have the choice to filter the report by PIN (this option will not appear in the list of fields displayed when the “Advanced Fields” button is clicked by for regular admin users). See Custom Admin Wireframe 40.4.1.1.

2.6.5 System Settings

The following system settings will be maintained through the System Settings forms. Additional settings may be added as needed during development.

The System Settings will contain two panels for maintaining information.

The first panel will control the Auto reply emails, sent for each of the Contact forms and for the e-Password request forms.

The second panel will control settings for the Custom Admin area, itself. Settings will include:

- Number of minutes after which to update CORE services information for particular users
- A switch to require the Target Users and Business Purpose fields in the Add/Edit a Resource forms. By default, the switch will be off, leaving these fields optional.
- The time of day at which scheduled reports will be run and sent. By default, this will be set to 12:01 am EST.
- Number of Days to display new features
- Site Wide Notification Message Display Y/N
- Site Wide Notification Message Text
- Site Wide Notification Message Type
- Form to maintain site maintenance schedule (days, times and message)

3. DOCUMENTATION

All of the custom development and Ektron settings will be documented and delivered to SSA on or before the agreed upon delivery date. All code (.Net, JavaScript, and SQL) will be commented where appropriate. The site architecture, .Net and Ektron configuration, Summon and ContentDM integration, Core Services and E-Passwords integration be separately documented.

The technical documentation will contain the following sections (additional sections may be added to the final documentation as needed).

3.1 Architecture

The site will be built using the following technologies:

- .NET
- Ektron
- SQL Server

The integration and configuration of these technologies will be documented in this section.

3.2 .NET Server

.Net configuration settings will be documented in this section including (but not limited to):

- HTTP Modules
- .net Cache
- Custom .Net Scripts
- Custom admin functionality

3.3 Ektron

Ektron configuration and customizations including (but not limited to) the following will be documented in this section:

- Smartforms
- Smart Form Content Types
- Approval workflow
- Taxonomy
- Document and Image Libraries
- Collections
- Menus
- Meta Data
- Aliasing

4. DEVELOPMENT REQUIREMENTS

The system will be developed on servers provided by SSA for the purpose of hosting the new website. Fig Leaf will install the required software on these servers including the latest versions of Ektron, .Net, and SQL Server database software.

5. APPROVAL

Upon signature below, SSA and Fig Leaf fully accept the functional requirements and any specifications documented herein, and authorize the initiation of work based on the development guidelines they constitute.

Additionally, SSA and Fig Leaf fully acknowledge and accept that changes to the functional requirements and/or specifications described herein, or changes to design requirements that affect these functional requirements and/or specifications, that are requested or made after signature of these Requirements, may significantly affect any project timelines based upon this document. Therefore, SSA and Fig Leaf shall evaluate any such changes on a per-instance basis to determine whether incorporation is acceptable, a modification order is warranted, and/or adjusting the project timeline accordingly is required.

FIG LEAF SOFTWARE, INC.	SOCIAL SECURITY ADMINISTRATION
Signature: ______________________________ Name: ______________________________ Title: ______________________________ Date: ______________________________	Signature: ______________________________ Name: ______________________________ Title: ______________________________ Date: ______________________________

APPENDIX A: Core Service Calls

A.1 EmailCoreService

Base URL: http://coreemailval.sspf.ssa.gov/emailcore/EmailCoreService?

URL PARAMETER(S)	INFORMATION RETURNED	NOTES
REQTYPE=GETALL&PIN=259760	<service> <displayName>**Mulder, Gene**</displayName> <postalCode>**21235-6401**</postalCode> <company>**SSA**</company> <state>**Maryland**</state> <telephone>**(410) 965-4135**</telephone> <email>**Gene.Mulder@ssa.gov**</email> <pin>**259760**</pin> <office>**DCBFQM/OMM/FO**</office> <department>**DCBFQM**</department> <street>**1521 Annex Building 6401 Security Boulevard**</street> <UPN>**259760@ba.ad.ssa.gov**</UPN> <alternateSignature>**Gene Mulder**</alternateSignature> <country>**United States**</country> <description>**BFQM 3AC OMM OAC**</description> <city>**Baltimore**</city> <signature>**Mulder**</signature> <grpMailBox>**OPUM.Webmasters@ssa.gov**</grpMailBox> <grpMailBox>**OPUM.Micro.Fiche.Library@ssa.gov**</grpMailBox> <grpMailBox>**OPUM.History@ssa.gov**</grpMailBox> <grpMailBox>**Digital.Library.Webmaster@ssa.gov**</grpMailBox> <grpMailBox>**DCCOMM.OPUM.Controls@ssa.gov**</grpMailBox> <grpMailBox>**Gene.Mulder@ssa.gov**</grpMailBox> <title>**Management Analyst**</title> </service>	
REQTYPE=GETEMAIL&PIN=259760	<service> <email>**Gene.Mulder@ssa.gov**</email> </service>	
REQTYPE=GETPIN&EMAIL=Gene.Mulder%40ssa.gov	<service> <pin>**259760**</pin> </service>	
REQTYPE=VERIFYEMAIL&EMAIL=Gene.Mulder%40ssa.gov	<service> <verify>**true**</verify> </service>	

A.2 IVFCoreService

Base URL: http://coreivfval.sspf.ssa.gov/services/IVFCoreService?

URL PARAMETER(S)	INFORMATION RETURNED	NOTES
PIN=259760&Application=Test	<service> <data>	The <ocd> tag

	<acid_clsfn_cd /> <dept>**OMM**</dept> <expdt>**null**</expdt> <fnm>**EUGENE**</fnm> <fn_cd>**PC505**</fn_cd> <lnm>**MULDER**</lnm> <long_temp_prfl_cd /> <mod /> <ocd>**CE0**</ocd> <org_grp>**CO**</org_grp> <posn_cd>**00505**</posn_cd> <posn_grp>**OTHER**</posn_grp> <realm>**BFQ**</realm> <rocd>**BFQ**</rocd> <short_temp_prfl_cd /> <stus_rsn_cd /> <tss_stus_cd>**A**</tss_stus_cd> <wrk_loc_ocd>**CE0**</wrk_loc_ocd> </data> </service>	(CE0 in the example) is used to send to the OfficeLookupCoreService to determine if the office is a DDS office.

A.3 OfficeLookupCoreService

Base URL: http://coreolval.sspf.ssa.gov/olcore/OfficeLookupCoreService?

URL PARAMETER(S)	INFORMATION RETURNED	NOTES
OFFICECODEA=S0A&QUERYTYPE=1&APPLICATION=VALTEST	<service> <olData> <db2SqlCd>**0**</db2SqlCd> <dj9OfcCode>**S0A**</dj9OfcCode> <dj9AltId /> <dj9OfcName>**NEPSC DPB**</dj9OfcName> <dj9OfcType>**07**</dj9OfcType> <dj9OfcTypeTxt>**DDS**</dj9OfcTypeTxt> <dj9OfcTimeZone /> <dj9RprtsToOfc>**PC1**</dj9RprtsToOfc> <dj9FieldOfcChildSw /> <dj9CntctstaTscunitSw /> <dj9FoUsBorderSw /> <dj9RoLetterCode>**B**</dj9RoLetterCode> <dj9AdoNumber /> <dj9RoAcronym>**NYC**</dj9RoAcronym> <dj9RoNumber>**02**</dj9RoNumber> <dj9OfcOpenDate>**2006-02-10**</dj9OfcOpenDate> <dj9OfcCloseDate /> <dj9OfcReopenDate /> <dj9OfcOpenCloseSw>**O**</dj9OfcOpenCloseSw> <dj9DataClctnSw /> <dj9OfcEmailAddr>**NY.ARC.PCO.DPB.NEPC@SSA.GOV**</dj9OfcEmailAddr> <dj9OfcAddress> <addressType>**PHYS**</addressType>	The <dj9OfcTypeTxt> tag (DDS in the example) is used to determine if the office is a DDS office.

	<dj9OfcAddrLine1>**NEPSC DISAB PROC BR**</dj9OfcAddrLine1> <dj9OfcAddrLine2>**1 JAMAICA CENTER PLAZA**</dj9OfcAddrLine2> <dj9OfcAddrLine3>**155-10 JAMAICA AVENUE**</dj9OfcAddrLine3> <dj9OfcAddrLine4 /> <dj9OfcCity28>**JAMAICA**</dj9OfcCity28> <dj9OfcSt>**NY**</dj9OfcSt> <dj9OfcZip5>**11432**</dj9OfcZip5> <dj9OfcZip4 /> </dj9OfcAddress> - <dj9OfcAddress> <addressType>**MAIL**</addressType> <dj9OfcAddrLine1>**SOCIAL SECURITY ADM**</dj9OfcAddrLine1> <dj9OfcAddrLine2>**DISABILITY PROC BRANCH**</dj9OfcAddrLine2> <dj9OfcAddrLine3>**PO BOX 314600**</dj9OfcAddrLine3> <dj9OfcAddrLine4 /> <dj9OfcCity28>**JAMAICA**</dj9OfcCity28> <dj9OfcSt>**NY**</dj9OfcSt> <dj9OfcZip5>**11431**</dj9OfcZip5> <dj9OfcZip4>**9945**</dj9OfcZip4> </dj9OfcAddress> <dj9OfcTelephone> <phoneType>**ADM**</phoneType> <dj9OfcPhone>**7185573901**</dj9OfcPhone> <dj9OfcPhoneExt /> <dj9OfcFaxPhone>**7185573902**</dj9OfcFaxPhone> <dj9OfcFaxExt /> </dj9OfcTelephone> <dj9OfcTelephone> <phoneType>**BUS**</phoneType> <dj9OfcPhone>**8005806873**</dj9OfcPhone> <dj9OfcPhoneExt /> <dj9OfcFaxPhone>**7185573902**</dj9OfcFaxPhone> <dj9OfcFaxExt /> </dj9OfcTelephone> <dj9OfcTelephone> <phoneType>**EQP**</phoneType> <dj9OfcPhone>**7185573901**</dj9OfcPhone> <dj9OfcPhoneExt /> <dj9OfcFaxPhone /> <dj9OfcFaxExt /> </dj9OfcTelephone> <dj9OfcTelephone> <phoneType>**T2**</phoneType> <dj9OfcPhone /> <dj9OfcPhoneExt /> <dj9OfcFaxPhone /> <dj9OfcFaxExt /> </dj9OfcTelephone> <dj9OfcTelephone> <phoneType>**T16**</phoneType> <dj9OfcPhone />	

	<dj9OfcPhoneExt /> <dj9OfcFaxPhone /> <dj9OfcFaxExt /> </dj9OfcTelephone> <dj9OfcTelephone> <phoneType>**TTY**</phoneType> <dj9OfcPhone /> <dj9OfcPhoneExt /> <dj9OfcFaxPhone /> <dj9OfcFaxExt /> </dj9OfcTelephone> <dj9OfcEqpCntctFnm /> <dj9OfcEqpCntctMnm /> <dj9OfcEqpCntctLnm /> <dj9OfcEqpCntctSfx /> <dj9FoLinkedOhaOfc /> <dj9FoStateCountyCode /> <dj9FoDesignator /> <dj9OFcSecuredPrintr>**H008BBEB**</dj9OFcSecuredPrintr> <dj9OFcSpecialPrintr /> <dj9OFcAsstPrintr /> <dj9OFcProdRegion /> <dj9OFcRoutingInd>**RUSACOJ**</dj9OFcRoutingInd> <foOpenClose> <dj9DayOfWeek>**Sunday**</dj9DayOfWeek> <dj9FoOpen /> <dj9FoClose /> </foOpenClose> <foOpenClose> <dj9DayOfWeek>**Monday**</dj9DayOfWeek> <dj9FoOpen /> <dj9FoClose /> </foOpenClose> <foOpenClose> <dj9DayOfWeek>**Tuesday**</dj9DayOfWeek> <dj9FoOpen /> <dj9FoClose /> </foOpenClose> <foOpenClose> <dj9DayOfWeek>**Wednesday**</dj9DayOfWeek> <dj9FoOpen /> <dj9FoClose /> </foOpenClose> <foOpenClose> <dj9DayOfWeek>**Thursday**</dj9DayOfWeek> <dj9FoOpen /> <dj9FoClose /> </foOpenClose> <foOpenClose> <dj9DayOfWeek>**Friday**</dj9DayOfWeek> <dj9FoOpen /> <dj9FoClose /> </foOpenClose> <foOpenClose> <dj9DayOfWeek>**Saturday**</dj9DayOfWeek> <dj9FoOpen />	

	<dj9FoClose /> </foOpenClose> <foGnrlDirctns /> <dj9PcComponentName /> <dj9PcacsSw /> <dj9FspConsularCode /> <dj9FspTimeDiff /> <dj9FspRegion /> <dj9FspStateDeptRoutingInd /> <dj9FspRankType /> <dj9FspLanSw /> <dj9FspClaimSw /> <dj9FspFedBeneOfcr /> <dj9AltZip5 /> <dj9AltZip4 /> <dj9AdOfcCode /> <dj9RoOfcCode>**F02**</dj9RoOfcCode> </olData> </service>	

APPENDIX B: ContentDM

ContentDM Administration

https://server16760.contentdm.oclc.org
Login name: ssasdl
Password: ssalibrary

ContentDM Server

http://cdm16760.contentdm.oclc.org/

User Support Center

http://www.contentdm.org/USC/
Organization ID: SSAD5497
E-mail: ssasdl@figleaf.com
Password: ssalibrary

API Reference

http://www.contentdm.org/help6/custom/customize2a.asp

APPENDIX C: Summon

MAIN SITE

http://clientcenter.serialssolutions.com/
login name: ssasdl@figleaf.com
password: Figle@f2014

SSA Interface to Summon Search

http://ssa.summon.serialssolutions.com

Summon API

http://api.summon.serialssolutions.com/help/api/
Access ID: ssa
Secret Key: qWU16Lp6snentGvKVbFj71lOwmdd5DtU
username: figleaf
password: wfrufCSmD6

Summon Search Examples

- http://www.gvsu.edu/library/
- http://library.sfasu.edu/ (api example)
- http://pc6bf4sj5m.search.serialssolutions.com/?S=AC_T_B&V=1.0&N=75&L=PC6BF4SJ5M&C=jama
- http://rennes2.summon.serialssolutions.com/search?idx=&s.q=dogs&searchOn=summon&s.fvf[]=IsFullText%2Ctrue&spellcheck=true&s.fvf[]=IsFullText%2Ctrue&spellcheck=true&s.fvf[]=IsFullText%2Ctrue&spellcheck=true (favoriting example)
- http://hud.summon.serialssolutions.com/search?s.q=dogs#!/search?q=dogs
- https://www.library.cornell.edu/

APPENDIX D: Database Tables

The following tables will be created in a custom database (independent of the Ektron database) to support the site's custom admin functionality.

	TABLE	DESCRIPTION
1	Access to a Resource Form Submissions	Holds the information submitted through forms in the DL Site.
2	Access to a Resource Form Submissions Change History	Tracks changes made to records in the Form Submissions table.
3	Click Tracking	Tracks the links clicked throughout the DL Site
4	E-Password Assignments	Maintain list of users and resources to which they have e-passwords
5	E-Password Assignments Change History	Tracks changes made to E-Password Assignments table
6	Form Auto-replies	Messages to be sent upon form submissions
7	My Resources	Holds all users' My Resource/Favorites choices
8	Password Assistance Form Submissions	Holds the information submitted through forms in the DL Site.
9	Password Assistance Form Submissions Change History	Tracks changes made to records in the Form Submissions table.
10	Report (one record per real time, predefined or custom report)	Report definitions including search criteria and files with layout code
11	Reports Saved	Saved reports including names, descriptions and criteria
12	Report Change History	Tracks changes to report table records
13	Report Instances	Tracks report executions
14	Report Schedule	Maintain schedules of when reports should be run
15	Report Schedule Change History	Tracks changes to report schedule table records
16	Reporting a Problem Form Submissions	Holds the information submitted through forms in the DL Site.
17	Reporting a Problem Form Submissions Change History	Tracks changes made to records in the Form Submissions table.
18	Request for an Article Form Submissions	Holds the information submitted through forms in the DL Site.
19	Request for an Article Form Submissions Change History	Tracks changes made to records in the Form Submissions table.
20	Research Assistance Form Submissions	Holds the information submitted through forms in the DL Site.
21	Research Assistance Form Submissions Change History	Tracks changes made to records in the Form Submissions table.
22	Resources	Resources available to be listed in the DL web site
23	Resources Change History	Tracks changes made to records in the resources table
24	Resources Contracts	Maintains information regarding contracts for resources for multiple years (one record per resource contract per fiscal year)
25	Resources Contract Change History	Tracks changes to Resource Contract Table records
26	Site Maintenance	
27	Suggesting a New Resource Form Submissions	Holds the information submitted through

		forms in the DL Site.
28	Suggesting a New Resource Form Submissions Change History	Tracks changes made to records in the Form Submissions table.
29	System Settings	System setting name value pairs
30	System Setting Change History	Track changes made to records in the system settings table
31	Training Request Form Submissions	Holds the information submitted through forms in the DL Site.
32	Training Request Form Submissions Change History	Tracks changes made to records in the Form Submissions table.
33	Users	Custom Admin Users
34	Users Change History	Tracks changes made to records in the users table
35	User Core Service Lookup (one record for each user)	Tracks the last time Core Services was queried for the current user (if no record exists, Core Service information is not saved, or if last call was more than X minutes ago, re-query Core Services)
36	User Notification Dismissal	Tracks when each user last dismissed the Site Wide Notification Message. The date and time they dismissed a message will be compared to the date and time the site wide notification message was last updated to determine whether it should be displayed.

Table 8: Database Table Listing

	TABLE	DESIGN
1	Access to a Resource Form Submissions (one record per form submission)	**FIELDS** • ID (primary key) • Submitted By PIN • Submitted By Last Name • Submitted By First Name • Submitted By EMail • Submitted By Office • Submitted By Server • Submitted By User Domain • Submitted For PIN • Submitted For Last Name • Submitted For First Name • Submitted For EMail • Submitted For Office • Submitted For Server • Submitted By User Domain • Submission Date and Time • Resource to access • Why do you need access • Internal Notes • Form Status (open, closed)
2	Access to a Resource Form Submissions Change History (one record per form submission field	**FIELDS** • ID (primary key) • Form Submission ID (from Access to a Resource Form

	change)	Submissions table) • Name of Field Changed • Before Value • After Value • Change made by PIN • Change date and time
3	Click Tracking	**FIELDS** • ID (primary key) • Clicked By PIN • Clicked By Last Name • Clicked By First Name • Clicked By EMail • Clicked By Office • Clicked By server • Clicked By User Domain • Clicked date and time • DL Site URL where link was clicked • DL Site link target URL
4	E-Password Assignments	**FIELDS** • ID (primary key) • User PIN • Resource ID (from Resource table) • E-Pass assignment date • Password assigned by • Password • Password Active Y/N
5	E-Password Assignments Change History	**FIELDS** • ID (primary key) • E-Password Assignments ID (from E-Password Assignments table) • Name of Field Changed • Before Value • After Value • Change made by PIN • Change date and time
6	Form Auto-replies (one record per form)	**FIELDS** • ID (primary key) • Form • Send Request Received Email Message • Request Received Email Message Subject • Request Received Email Message Text • Request Received Email Message From Address • Send Request Closed Email Message • Request Closed Email Message Subject • Request Closed Email Message Text • Request Closed Email Message From Address • Send Request Approved Email Message (e-pass only) • Request Approved Email Message Subject (e-pass only) • Request Approved Email Message Text (e-pass only) • Request Approved Email Message From Address (e-pass only) • Send Request Declined Email Message (e-pass only) • Request Declined Email Message Subject (e-pass only) • Request Declined Email Message Text (e-pass only) • Request Declined Email Message From Address (e-pass only)
7	My Resources	**FIELDS**

		• ID (primary key) • PIN Number • Favorite URL • Date Added
8	Password Assistance Form Submissions	**FIELDS** • ID (primary key) • Submitted By PIN • Submitted By Last Name • Submitted By First Name • Submitted By EMail • Submitted By Office • Submitted By Server • Submitted By User Domain • Submitted For PIN • Submitted For Last Name • Submitted For First Name • Submitted For EMail • Submitted For Office • Submitted For Server • Submitted By User Domain • Submission Date and Time • Resource for which assistance is needed • Additional notes or details • Internal Notes • Form Status (open, closed)
9	Password Assistance Form Submissions Change History	**FIELDS** • ID (primary key) • Form Submission ID (from Password Assistance Form Submissions table) • Name of Field Changed • Before Value • After Value • Change made by PIN • Change date and time
10	Report (one record per real time, predefined or custom report)	**FIELDS** • ID (primary key) • Name • Created by PIN • Create date • Last modified date • Last run date • Report Execution file • Report SQL Statement
11	Reports Saved	**FIELDS** • ID (primary key) • Date/Time Run • Run by PIN • Report ID (from Report Table) • Report SQL Statement
12	Report Change History	**FIELDS** • ID (primary key) • Report ID (from report table) • Name of Field Changed • Before Value • After Value • Change made by PIN • Change date and time
13	Report Instances	**FIELDS** • ID (primary key)

		• Report ID (from reports table) • Date/time run • Run by PIN
14	Report Schedule	**FIELDS** • ID (primary key) • Report ID (from reports table) • Run Frequency (Daily, Weekly, Bi-Weekly, Monthly, Quarterly, Annually) • Start Date • Email Address(es) to be notified when report is run (they will receive link to the report)
15	Report Schedule Change History	**FIELDS** • ID (primary key) • Report Schedule ID (from reports schedule table) • Name of Field Changed • Before Value • After Value • Change made by PIN • Change date and time
16	Reporting a Problem Form Submissions	**FIELDS** • ID (primary key) • Submitted By PIN • Submitted By Last Name • Submitted By First Name • Submitted By EMail • Submitted By Office • Submitted By Server • Submitted By User Domain • Submitted For PIN • Submitted For Last Name • Submitted For First Name • Submitted For EMail • Submitted For Office • Submitted For Server • Submitted By User Domain • Submission Date and Time • Problem Type (resource or website) • Problem source (resource name or website url) • Problem description • Screen shot image • Internal Notes • Form Status (open, closed)
17	Reporting a Problem Form Submissions Change History	**FIELDS** • ID (primary key) • Form Submission ID (from Reporting a Problem Form Submissions table) • Name of Field Changed • Before Value • After Value • Change made by PIN • Change date and time
18	Request for an Article Form Submissions	**FIELDS** • ID (primary key) • Submitted By PIN • Submitted By Last Name • Submitted By First Name • Submitted By EMail • Submitted By Office

		• Submitted By Server • Submitted By User Domain • Submitted For PIN • Submitted For Last Name • Submitted For First Name • Submitted For EMail • Submitted For Office • Submitted For Server • Submitted By User Domain • Submission Date and Time • Article Title or Keyword • Authors • Journal Title • Year Published • Why do you need this article • Internal Notes • Form Status (open, closed)
19	Request for an Article Form Submissions Change History	**FIELDS** • ID (primary key) • Form Submission ID (from Request for an Article Form Submissions table) • Name of Field Changed • Before Value • After Value • Change made by PIN • Change date and time
20	Research Assistance Form Submissions	**FIELDS** • ID (primary key) • Submitted By PIN • Submitted By Last Name • Submitted By First Name • Submitted By EMail • Submitted By Office • Submitted By server • Submitted By User Domain • Submitted For PIN • Submitted For Last Name • Submitted For First Name • Submitted For EMail • Submitted For Office • Submitted For server • Submitted By User Domain • Submission Date and Time • Subject • Resource • How can we help • Internal Notes • Form Status (open, closed)
21	Research Assistance Form Submissions Change History	**FIELDS** • ID (primary key) • Form Submission ID (from Research Assistance Form Submissions table) • Name of Field Changed • Before Value • After Value • Change made by PIN • Change date and time
22	Resources	**FIELDS**

		• ID (primary key) • Resource Name • Description • Resource Type (from Ektron Taxonomy) • URL link to the Resource • Show resource in new window Y/N • Admin URL link to resource (if needed) • Admin Username (if needed) • Admin Password (if needed) • File 1 • File 2 • File 3 • Subject Areas (from Ektron Smart Form instances, multiple can be selected) • Show in subject areas Y/N • Show in Databases A-Z Y/N • Show in Training Request Form Y/N • Show in Audience Tools (select from list of audience terms defined in taxonomy) • Mandatory Y/N • Associated Network • Access Type (from Resource Access Type taxonomy) • Resource Registration Instructions • Shared Username • Shared Password • Show Login to (All or only DDS employees) • Limited number of passwords available Y/N • Number of passwords available • Send e-password requests to (select 1 or more from list of all Custom Admin users) • Password Requests restricted to managers Y/N. Note: if this checkbox is checked, a message with be displayed on the Access to a Resource Form visible in the DL site indicating access to this resource is restricted to managers only. • Target users • Business Purpose of resource • Resource Display Status (enabled, inactive, temporarily disabled)
23	Resources Change History	**FIELDS** • ID (primary key) • Resource ID (from Resources table) • Name of Field Changed • Before Value • After Value • Change made by PIN • Change date and time
24	Resources Contract (one record per resource contract per fiscal year)	**FIELDS** • ID (primary key) • Resource ID (from Resources table) • Fiscal Year • Period of performance start • Period of performance end • Requisition number • Contract number • Number of licenses owned (none, unlimited, or a number) • Annual contract cost • Procurement Method (select from Procurement

		Method taxonomy) • Contract File Name • Critical Notes • Notify of expiration this many days in advance • Library Contracting Officer's Representative (COR) • Vendor Name • Representative Name • Email • Phone • Technical Contact Name • Email • Phone • New Features • Notification Active Start Date • Notification Active End Date
25	Resources Contract Change History	**FIELDS** • ID (primary key) • Resources Contract ID (from Resources Contract table) • Name of Field Changed • Before Value • After Value • Change made by PIN • Change date and time
26	Site Maintenance	**FIELDS** • Start Time • End Time • Message To Display • Days of week (choose 0, 1 or more from list of days)
27	Suggesting a New Resource Form Submissions	**FIELDS** • ID (primary key) • Submitted By PIN • Submitted By Last Name • Submitted By First Name • Submitted By EMail • Submitted By Office • Submitted By Server • Submitted By User Domain • Submitted For PIN • Submitted For Last Name • Submitted For First Name • Submitted For EMail • Submitted For Office • Submitted For Server • Submitted By User Domain • Submission Date and Time • Name of resource • What is the business need for this resource • Additional information • Approving Supervisor • Internal Notes • Form Status (open, closed)
28	Suggesting a New Resource Form Submissions Change History	**FIELDS** • ID (primary key) • Form Submission ID (from Suggesting a New Resource Form Submissions table) • Name of Field Changed • Before Value • After Value

		• Change made by PIN • Change date and time
29	System Settings (one row for each setting)	**FIELDS** • ID (primary key) • Setting Name • Setting Value • Last Date Modified • Edited BY PIN
30	System Setting Change History	**FIELDS** • ID (primary key) • Setting ID (From system settings table) • Before Value • After Value • Change made by PIN • Change date and time
31	Training Request Form Submissions	**FIELDS** • ID (primary key) • Submitted By PIN • Submitted By Last Name • Submitted By First Name • Submitted By EMail • Submitted By Office • Submitted By Server • Submitted By User Domain • Submitted For PIN • Submitted For Last Name • Submitted For First Name • Submitted For EMail • Submitted For Office • Submitted For Server • Submitted By User Domain • Submission Date and Time • Subject • Resource • Number of attendees • Requested date • Requested time • Location • Other information • Internal Notes • Form Status (open, closed)
32	Training Request Form Submissions Change History	**FIELDS** • ID (primary key) • Form Submission ID (from Training Request Form Submissions table) • Name of Field Changed • Before Value • After Value • Change made by PIN • Change date and time
33	Users	**FIELDS** • ID (primary key) • PIN • Email Address • First Name • Last Name • Access Level (Admin, Super) • COR Y/N • COR Expire Date

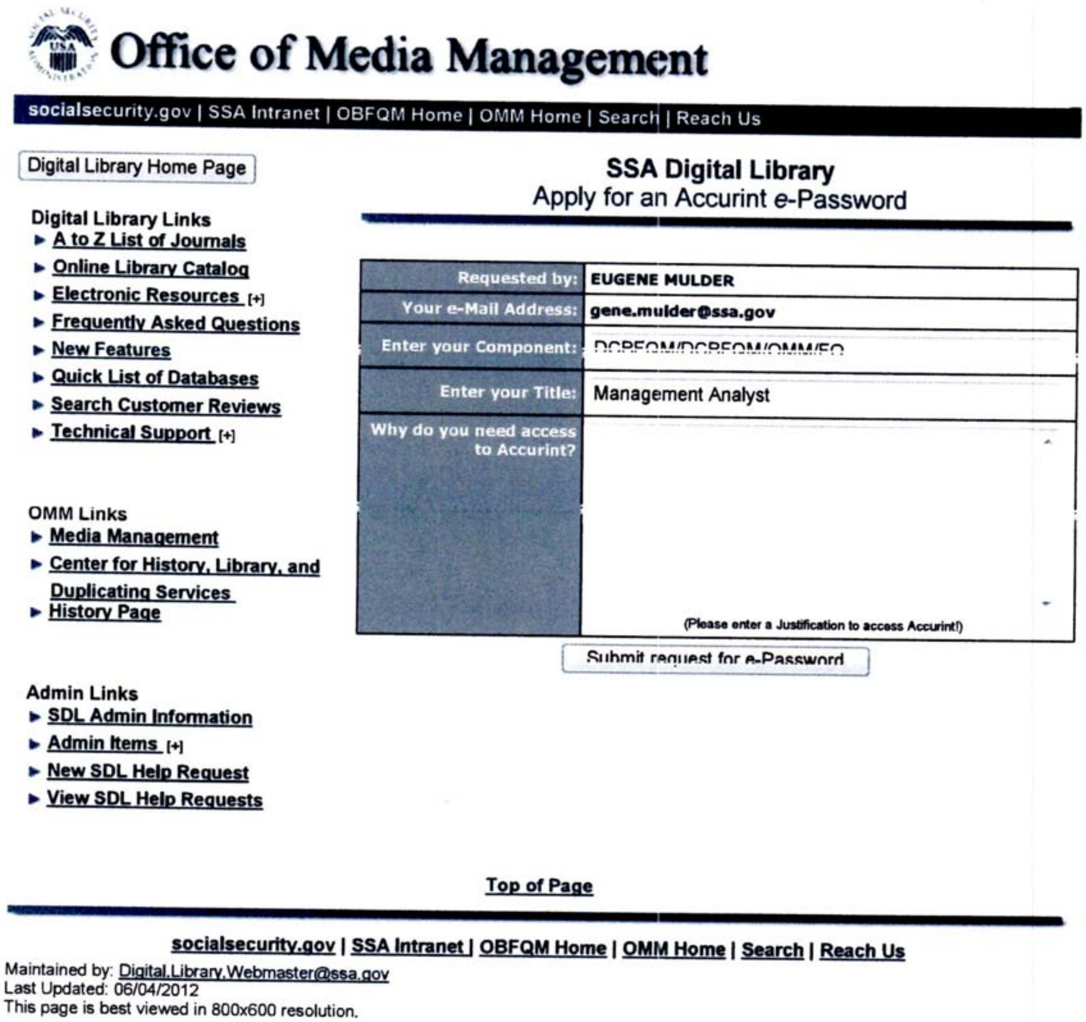
		• Active Y/N • Create Date
34	Users Change History	**FIELDS** • ID (primary key) • Form Submission ID (from Access to a Resource Form Submissions table) • Name of Field Changed • Before Value • After Value • Change made by PIN • Change date and time
35	User Core Service Lookup (one record for each user)	**FIELDS** • ID (primary key) • Last Core Services Call Date and Time
36	User Notification Dismissal	**FIELDS** • ID (primary key) • User PIN • Site Wide Notification Last Dismissed Date/Time

Table 9: Database Table Designs

APPENDIX E: Screen Shots Of Current Site

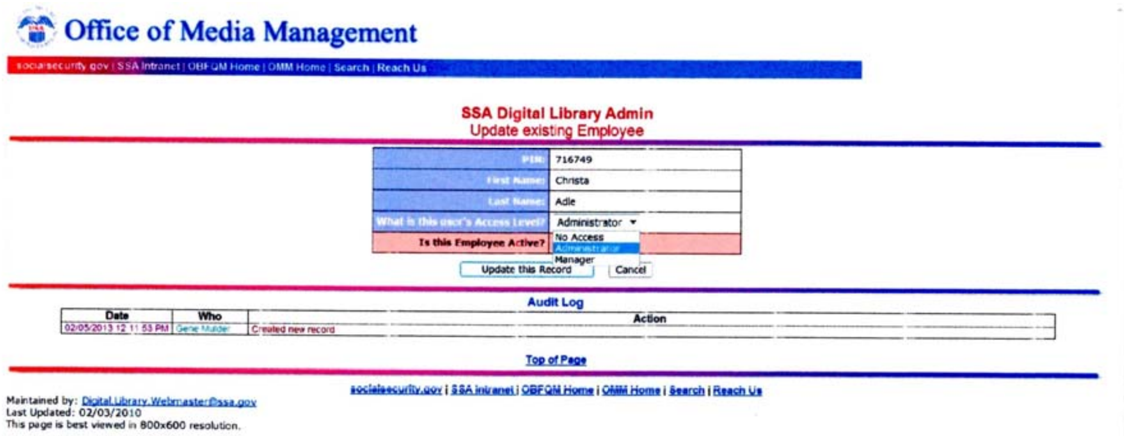
The following screen shots were provided to Fig Leaf during the discovery phase and may be useful for development. Notes regarding the current use and other information follow each screen.

E.1 Apply For e-Password



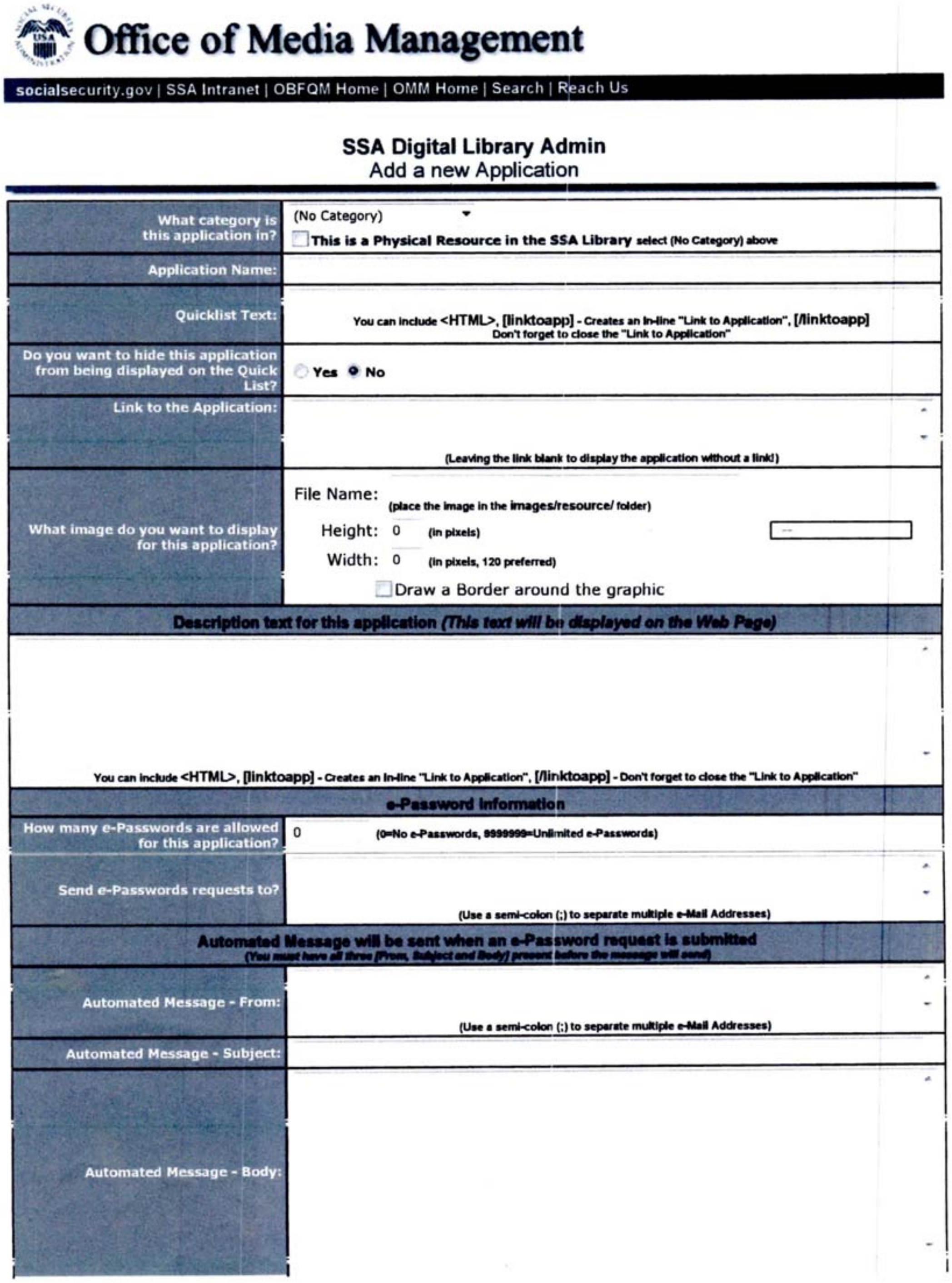
Notes: Access to Resource Form (DL Wireframe 26.2) in new design

E.2 Update Existing Employee



Notes: Edit User Profile Form (DL Custom Admin Wireframe 30.1) in new design

E.3 Add Application (3 screens)



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SSA Digital Library Admin

Add a new Application

What category is this application in?	(No Category) This is a Physical Resource in the SSA Library select (No Category) above
Application Name:	
Quicklist Text:	You can include <HTML>, [linktoapp] - Creates an in-line "Link to Application", [/linktoapp] Don't forget to close the "Link to Application"
Do you want to hide this application from being displayed on the Quick List?	Yes No
Link to the Application:	(Leaving the link blank to display the application without a link!)
What image do you want to display for this application?	File Name: (place the image in the images/resource/ folder) Height: 0 (in pixels) Width: 0 (in pixels, 120 preferred) Draw a Border around the graphic

Description text for this application (This text will be displayed on the Web Page)

You can include <HTML>, [linktoapp] - Creates an in-line "Link to Application", [/linktoapp] - Don't forget to close the "Link to Application"

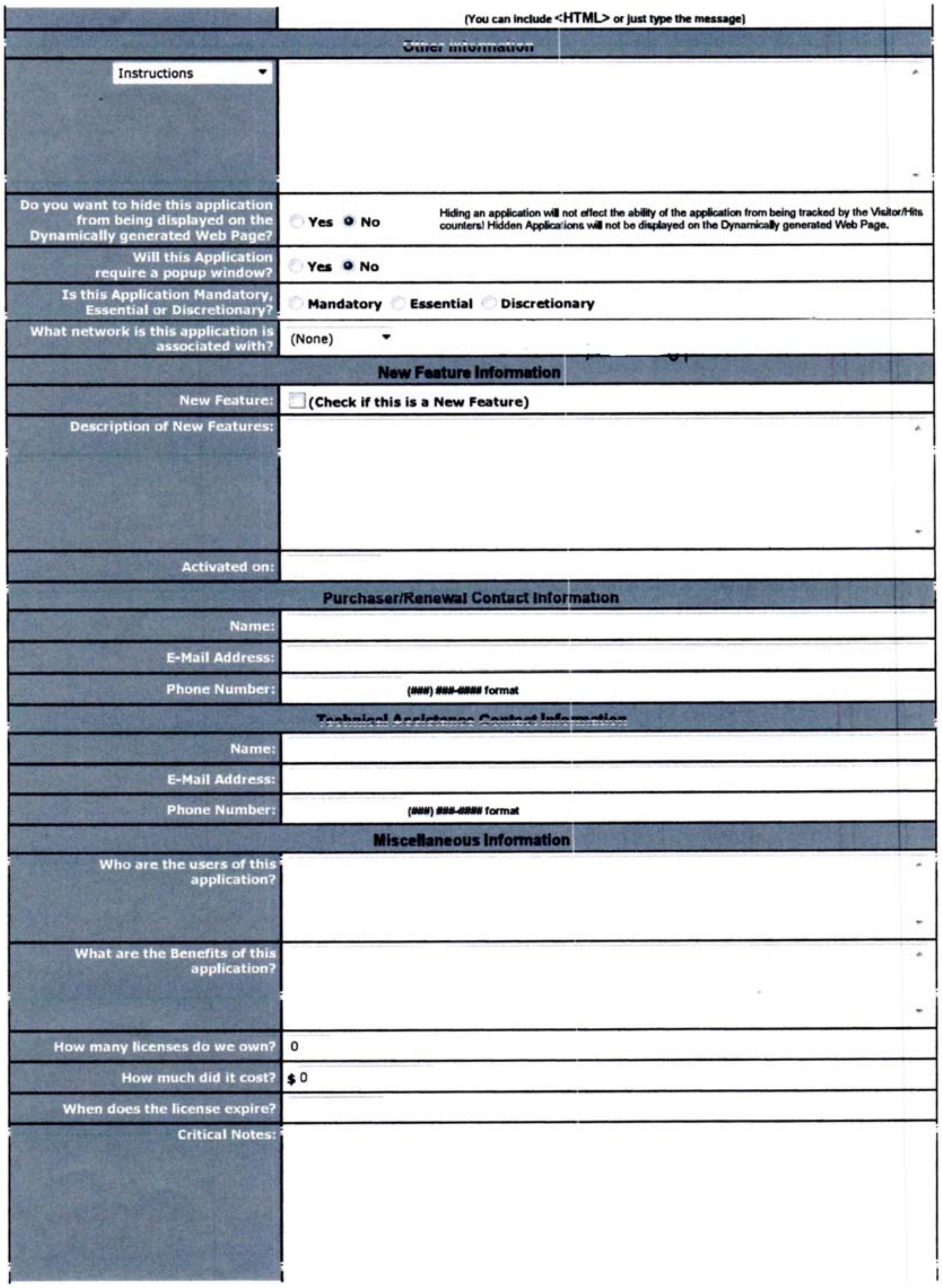
e-Password Information

How many e-Passwords are allowed for this application?	0 (0=No e-Passwords, 9999999=Unlimited e-Passwords)
Send e-Passwords requests to?	(Use a semi-colon (;) to separate multiple e-Mail Addresses)

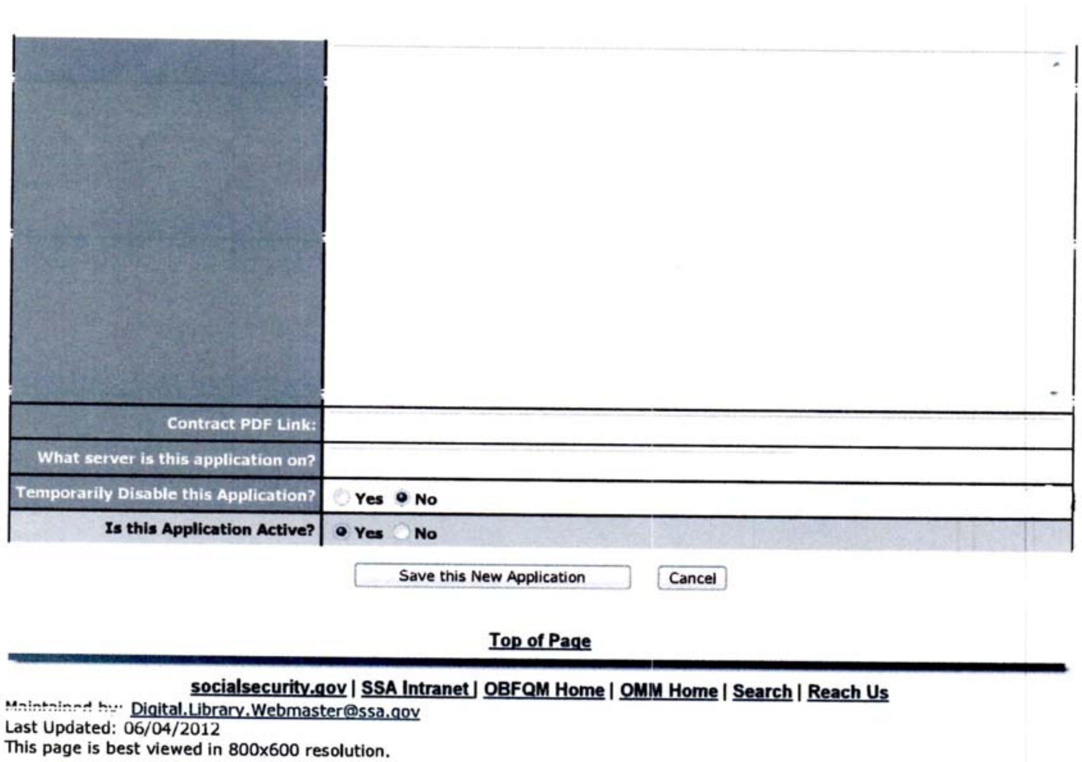
Automated Message will be sent when an e-Password request is submitted

(You must have all three (From, Subject and Body) present before the message will send)

Automated Message - From:	(Use a semi-colon (;) to separate multiple e-Mail Addresses)
Automated Message - Subject:	
Automated Message - Body:	

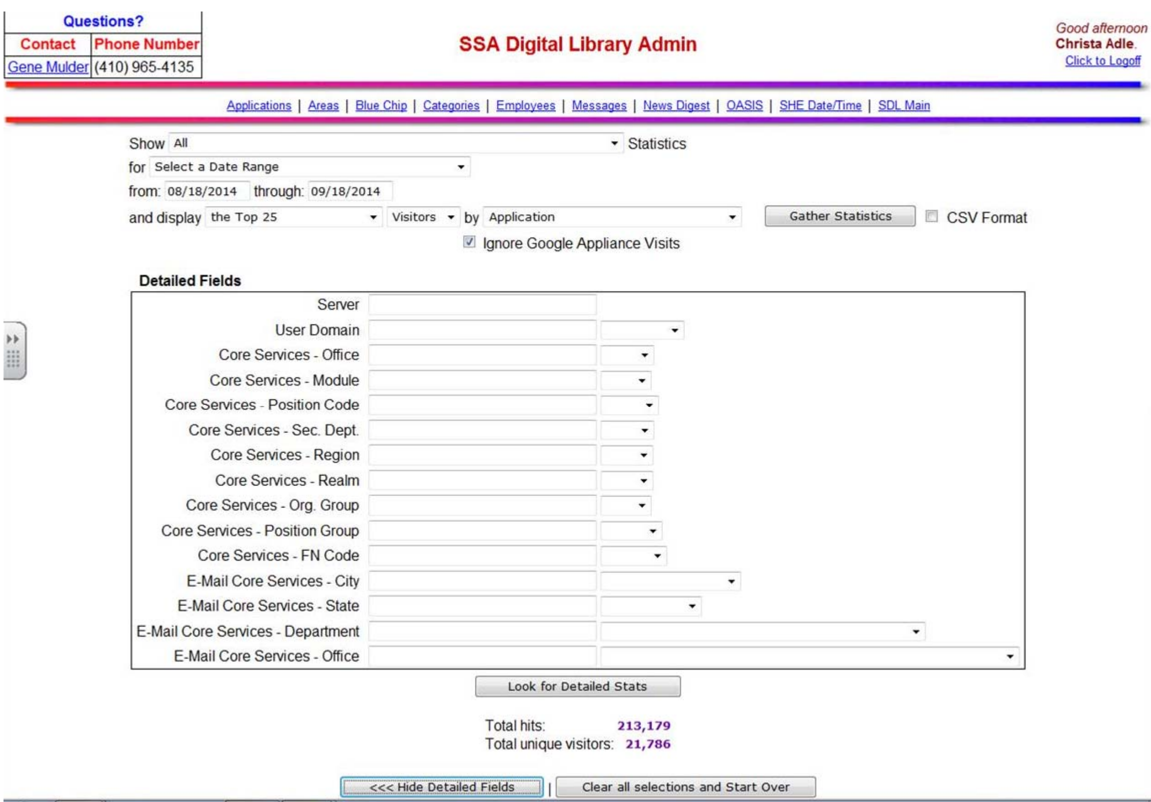


	(You can include <HTML> or just type the message)
Other Information	
Instructions	
Do you want to hide this application from being displayed on the Dynamically generated Web Page?	Yes ● No — Hiding an application will not effect the ability of the application from being tracked by the Visitor/Hits counters! Hidden Applications will not be displayed on the Dynamically generated Web Page.
Will this Application require a popup window?	Yes ● No
Is this Application Mandatory, Essential or Discretionary?	Mandatory Essential Discretionary
What network is this application is associated with?	(None)
New Feature Information	
New Feature:	(Check if this is a New Feature)
Description of New Features:	
Activated on:	
Purchaser/Renewal Contact Information	
Name:	
E-Mail Address:	
Phone Number:	(###) ###-#### format
Technical Assistance Contact Information	
Name:	
E-Mail Address:	
Phone Number:	(###) ###-#### format
Miscellaneous Information	
Who are the users of this application?	
What are the Benefits of this application?	
How many licenses do we own?	0
How much did it cost?	$ 0
When does the license expire?	
Critical Notes:	



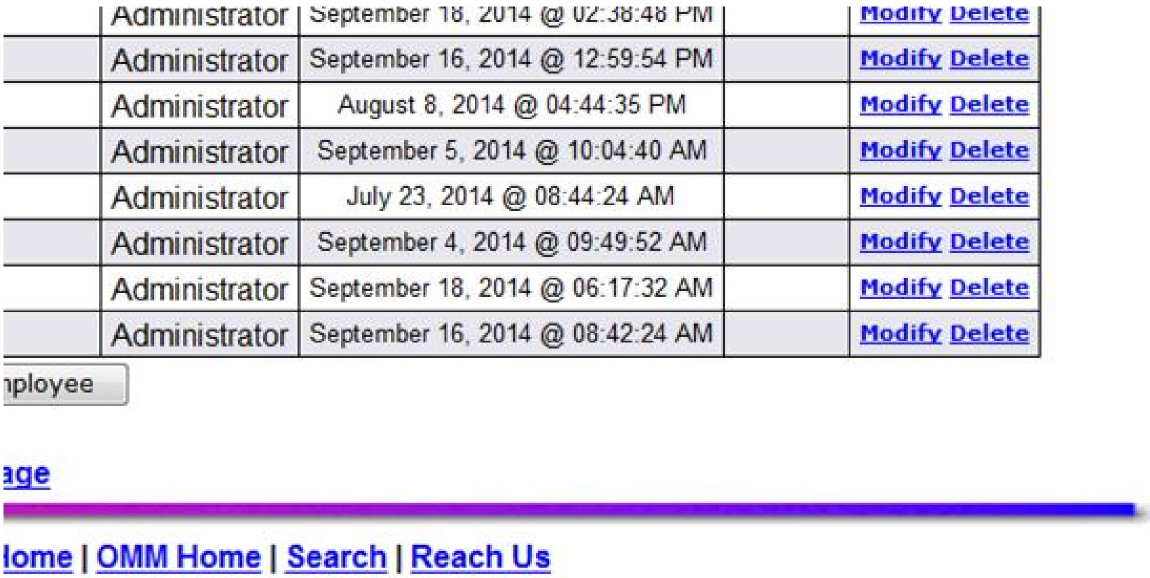
Notes: Add A Resource (DL Wireframe 33.1) in new design.

E.4 Detailed Fields



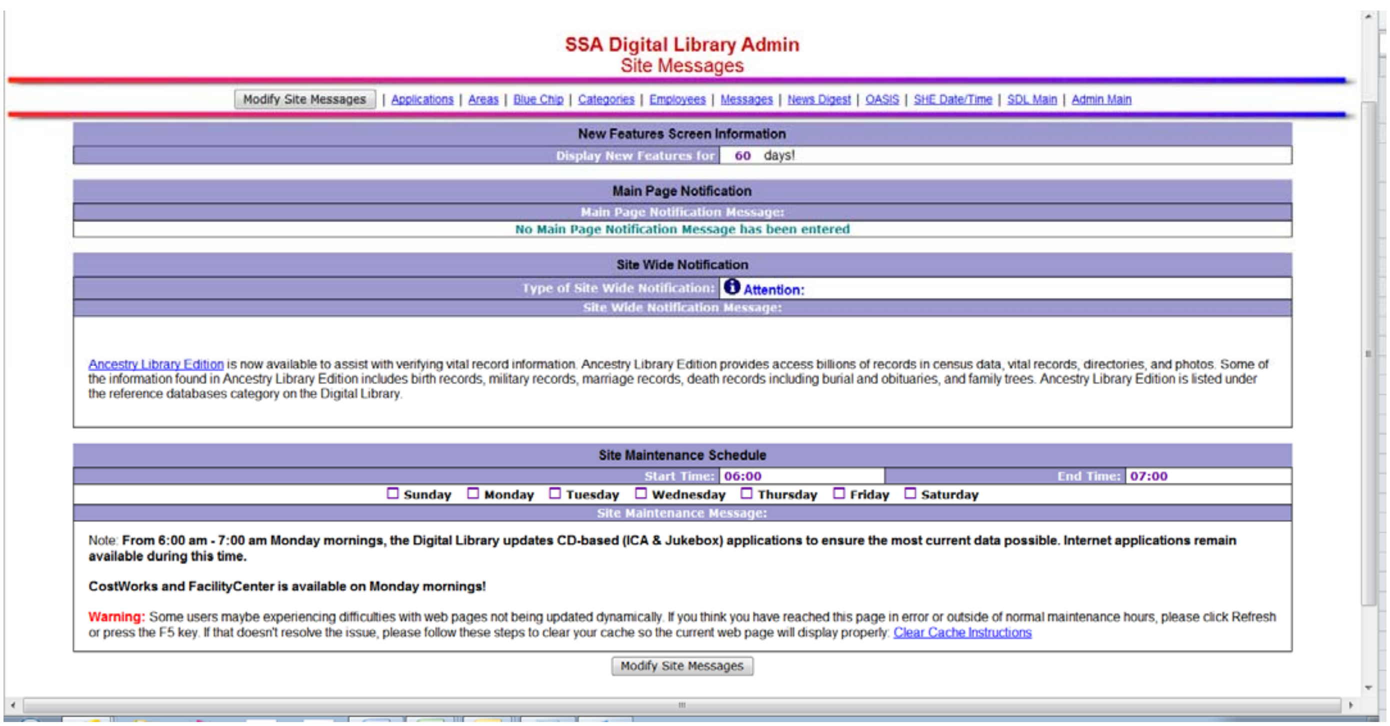
Notes: Advanced Fields for Ad Hoc Resource Reports (Custom Admin Wireframe 40.4.1.1) in new design. PIN will also display in the list of Detailed Fields (and in the "By" field) for Super Admins.

E.5 Employees



Notes: Users Page (Custom Admin Wireframe 29.1)

E.5 Site Messages



Notes: No wireframe was designed to provide this functionality. A form will be available in the new site that will be modelled after this one.